



Evaluations Support Branch



THE ENLISTED IMA SOLDIER

IMA CONFERENCE 28-30 OCTOBER 2002

Taking e-Care of Soldiers

MSG Armstrong, ENL EVALS 800-648-5484



Reports

- **Special tours: AT, ADT, ADSW, or TTAD**
- **Command attachment: annual ratings**



Special Tours

- **11 or more consecutive days of active duty**
- **The command of attachment/assignment will contact NCO 14 days prior to tour of duty**
- **Face to face counseling NLT 1200 hours first day of duty**
- **Rater will conduct counseling**



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Special Tours

- **Use of DA Form 2166-8-1 is mandatory**
- **NCO understands requirements and responsibilities**
- **Give NCO opportunities to express their expectations**
- **Additional counseling session at the midpoint of the tour**



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Annual Reports

- **Assigned or attached to Active Army or Reserve**
Component Commands
- **Perform indefinite periods of IDT, ADT, pay/points**
- **Conducted within the first 30 days (DA Form 2166-8-1)**
- **Conducted at least twice a year**



NCO COUNSELING CHECKLIST/RECORD

For use of this form, see AR 623-205; the proponent agency is DCSPER

NAME OF RATED NCO

RANK

DUTY POSITION

UNIT

Completed by the rater for each rated NCO.

PURPOSE: The primary purpose of counseling is to improve performance and to professionally develop the rated NCO. The best counseling is always looking forward. It does not dwell on the past and on what was done, rather on the future and what can be done better. Counseling at the end of the rating is too late since there is no time to improve before evaluation.

RULES:

1. Face-to-face performance counseling is mandatory for all Noncommissioned Officers.
2. This form is for use along with a working copy of the NCO-ER for conducting NCO performance counseling and recording counseling content and dates. Its use is mandatory for counseling all NCOs, CPL through CSM.
3. Active Component: Initial counseling must be conducted within the first 30 days of each rating period, and at least quarterly thereafter. Reserve Component (ARNG, USAR). Counseling must be conducted at least semiannually. There is no mandatory counseling at the end of the rating period.

CHECKLIST - FIRST COUNSELING SESSION AT THE BEGINNING OF THE RATING PERIOD

PREPARATION

1. Schedule counseling session, notify rated NCO.
2. Get copy of last duty description used for rated NCO's duty position, a blank copy of the NCO-ER, and the names of the new rating chain.
3. Update duty description (see page 2).
4. Fill out rating chain and duty description on working copy of NCO-ER. Parts II and III.
5. Read each of the values/responsibilities in part IV of NCO-ER and the expanded definitions and examples on page 3 and 4 of this form.
6. Think how each value and responsibility in Part IV of NCO-ER applies to the rated NCO and his/her duty position.
Note: Leadership and training may be more difficult to apply than the other values/responsibilities when the rated NCO has no subordinates. Leadership is simply influencing others in the accomplishment of the mission and that can include peers and superiors. It also can be applied directly to additional duties and other areas of Army community life. Individual training is the responsibility of all NCOs whether or not there are subordinates. Every NCO knows something that can be taught to others and should be involved in some way in a training program.
7. Decide what you consider necessary for success (a meets standards rating) for each value/responsibility. Use the examples listed on pages 3 and 4 of this form as a guide in developing your own standards for success. Some may apply exactly, but you may have to change them or develop new ones that apply to your situation. Be specific so the rated NCO will know what is expected.
8. Make notes in blank spaces in Part IV of NCO-ER to help when counseling.
9. Record rated NCO's name, rank, duty position, and unit date on this form.
10. Write key points to be made during the counseling session on this form.
11. Review Developmental Counseling in FM 22-100, appendix C.

COUNSELING

1. Make sure rated NCO knows rating chain.
2. Show rated NCO the draft duty description on your working copy of the NCO-ER. Explain all parts. If rated NCO performed in position before, ask for any ideas to make duty description better.
3. Discuss the meaning of each value/responsibility in Part IV of NCO-ER. Use the trigger words on the NCO-ER, and the expanded definitions of pages 3 and 4 of this form to help.
4. Explain how each value/responsibility applies to the specific duty position by showing or telling your standards for success (a meets standards rating). Use examples on pages 3 and 4 of this form as a start point. Be specific so the rated NCO really knows what's expected.
5. When possible, give specific examples of excellence that could apply. This gives the rated NCO something special to strive for. Remember that only a few achieve real excellence and that real excellence always includes specific results and often includes accomplishments of subordinates.
6. Give rated NCO opportunity to ask questions and make suggestions.

BEFORE THE NCO DEPARTS THE COUNSELING SESSION

1. Record counseling date on this form.
2. Write any additional key points that came up during the counseling session on this form.
3. Show key points to rated NCO and get his/her initials.
4. Save NCO-ER with this checklist for next counseling session.

CHECKLIST - LATER COUNSELING SESSIONS DURING THE RATING PERIOD

PREPARATION

1. Schedule counseling session, notify rated NCO, and tell him/her to come prepared to discuss what has been accomplished in each value/responsibility area.
2. Look at working copy of NCO-ER you used during last counseling session.
3. Read and update duty description. Especially note the area of special emphasis; the priorities may have changed.
4. Read again, each of the values/responsibilities in Part IV of NCO-ER and the expanded definitions and examples on pages 3 and 4 of this form; then think again, about your standards for success.
5. Look over the notes you wrote down on page 2 of this form about the last counseling session.

6. Think about what the rated NCO has done so far during this rating period (specifically, observed action, demonstrated behavior, and results).
7. For each value/responsibility area, answer three questions: First, what has happened in response to any discussion you had during the last counseling session?; Second, what has been done well?; and Third, what could be done better?
8. Make notes in blank spaces in Part IV of NCO-ER to help focus when counseling. (Use new NCO-ER if old one is full from last counseling session).
9. Write key points to be made during the counseling session on this form.
10. Review Developmental Counseling in FM 22-100, appendix C.

DA FORM 2166-8-1, J UN 00

REPLACES DA FORM 2166-7-1, AUG 87, WHICH IS OBSOLETE

USAPPC

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COUNSELING RECORD / KEY POINTS MADE	
INITIAL	<p>Conducted the first day of special tour or within the first 30 days of the rating period.</p> <p>DATE _____ RATED NCO's INITIALS _____</p>
LATER	<p>Later counseling sessions midway of the tour or at least twice annually.</p> <p>DATE _____ RATED NCO's INITIALS _____</p>
LATER	<p>Same as above.</p> <p>DATE _____ RATED NCO's INITIALS _____</p>
LATER	<p>Same as above.</p> <p>DATE _____ RATED NCO's INITIALS _____</p>
DUTY DESCRIPTION (PART III of NCO-ER)	
<p>The duty description is essential to performance counseling and evaluation. It is used during the first counseling session to tell the rated NCO what the duties are and what needs to be emphasized. It may change somewhat during the rating period. It is used at the end of the rating period to record what was important about the duties.</p> <p>The five elements of the duty description:</p> <p>1&2. Principal Duty Title and Duty MOS Code. Enter Principal duty title and DMOS that most accurately reflects actual duties performed.</p> <p>3. Daily Duties and Scope. This portion should address the most important routine duties and responsibilities. Ideally, this should include the number of people supervised, equipment, facilities, and dollars involved and any other routine duties and responsibilities critical to mission accomplishment.</p>	<p>4. Area of Special Emphasis. This portion is most likely to change somewhat during the rating period. For the first counseling session, it includes those items that require top priority effort at least for the first part of the upcoming rating period. At the end of the rating period, it should include the most important items that applied at any time during the rating period (examples are preparation for deployment, combined arms drills training for FTX, preparation for NTC rotation, revision of battalion maintenance SOP, training for tank table qualification, ITEP and company AMTP readiness, related tasks cross-training, reserve components annual training support (AT) and SIDPERS acceptance rate.</p> <p>5. Appointed Duties. This portion should include those duties that are appointed and are not normally associated with the duty description.</p>



Rating Officials

- **RATER:** Focus on performance; responsible for counseling
- **SENIOR RATER:** Focus on overall performance and potential; mentoring
- **REVIEWER:** CO/WO, SGM/CSM or MSG(P) in authorized SGM/CSM; rating safe guard over watch; comments when in disagreement with rater and/or senior rater



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EXCELLENCE

- **EXCEEDS STANDARDS**
- **DEMONSTRATED BY SPECIFIC EXAMPLE(S)
AND
MEASURABLE RESULTS**
- **SPECIAL AND UNUSUAL, ACHIEVED BY
ONLY A FEW**
- **CLEARLY BETTER THAN MOST OTHERS**

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SUCCESS

- MEETS ALL STANDARDS
- MAJORITY OF RATINGS
- FULLY COMPETITIVE FOR PROMOTION AND SCHOOLING
- COUNSELING GOAL IS TO BRING ALL NCOS TO ACHIEVE OR EXCEED THIS LEVEL

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NEEDS IMPROVEMENT

- MISSED MEETING SOME/ALL STANDARD(S)



+ NCO EVALUATION REPORT										SEE PRIVACY ACT STATEMENT IN AR 623-205, APPENDIX E		+			
For use of this form see AR 623-205; the reporting agency is DCS/PER															
PART I - ADMINISTRATIVE DATA															
a. NAME (Last, First, Middle Initial)				b. SSN		c. RANK		d. DATE OF RANK		e. PMOSC					
DOE, JOE				000-11-2222		SGT		9/1001							
f. UNIT, ORG, STATION, ZIP CODE OR APO, MAJOR COMMAND										g. REASON FOR SUBMISSION					
HHC 11TH ENGR BN, FORT BELVOIR, VA 22060										02 ANNUA					
FORSC (PERIOD COVERED)		i. RATED MONTHS		j. NON-RATED CODES		k. NO OF ENCL		l. RATED NCO COPY (Check one and Date)		m. PSC L Initials		n. CMD CODE			
FROM THRU								1. Given to NCO		Date					
YY MM		YY MM						2. Forwarded to NCO		991017		RDO			
9810		9909		12				X		TD12		FC			
0															
PART II - AUTHENTICATION															
a. NAME OF RATER (Last, First, Middle Initial)				SSN		SIGNATURE									
SMITH, FRANK				123-23-3333											
RANK, PMOSC, BRANCH, ORGANIZATION, DUTY ASSIGNMENT										DATE					
SSG, 71130, HHC 11TH ENRG BN, FORT BELVOIR, VA 22060, NCOIC, ADMIN															
b. NAME OF SENIOR RATER (Last, First, Middle Initial)				SSN		SIGNATURE									
WILLIAMS, CHARLES				506-44-0099											
RANK, PMOSC, BRANCH, ORGANIZATION, DUTY ASSIGNMENT										DATE					
CPT, AG, HHC 11TH ENGR BN, FORT BELVOIR, VA 22060,															
c. DUTY TITLE (and my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. Part I, high weight and APFT entries are verified. I have sent this report completed through Part V. I am aware of the appeals process (AR 623-205).										SIGNATURE		DATE			
d. NAME OF REVIEWER (Last, First, Middle Initial)				SSN		SIGNATURE									
ADAMS, JOHN D.															
RANK, PMOSC, BRANCH, ORGANIZATION, DUTY ASSIGNMENT										DATE					
LTC, AG, HHC 11TH ENGR BN, FORT BELVOIR, VA 22060															
e. 22060 (CONCURRENCE WITH RATER AND SENIOR RATER EVALUATIONS)										<input type="checkbox"/> NONCONCURRENCE WITH RATER AND/OR SENIOR RATER EVAL (See attached comments)					
PART III - DUTY DESCRIPTION (Rater)															
a. PRINCIPAL DUTY TITLE						b. DUTY MOESC									
ADMINISTRATIVE NCO						71120									
c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, equipment, facilities and details)															
SERVES AS NCOIC OF CASUALTY AREA; MONITORS REPORTS FOR CORRECT AND TIMELY SUBMISSION OF ACTIVE DUTY AND RETREE CASUALTIES. RESPONSIBLE FOR HEALTH, WELFARE, AND ACCOUNTABILITY OF THREE SOLDIERS IN HIS SECTION.															
d. AREAS OF SPECIAL EMPHASIS															
DRIVERS TRAINING NCO, ASSISTANT UNIT CTT															
TRAINING NCO															
e. APPOINTED DUTIES															
PUBLICATIONS CLERK, MILITARY FUNERAL HONORS NCO, COMPANY APFT															
f. EVALUATOR				INITIAL		LATER		LATER		LATER					
981009				990115		990414									
PART IV - VALUES, NONRESPONSIBILITIES (Rater)															
a. Complete each question. (Comments are mandatory for "No" entries optional for "Yes" entries)												YES	NO		
<div>V A L U E S</div> <div>PERSONAL Commitment Competence Courage</div> <div>ARMY ETHIC Loyalty Duty Selfless Service Integrity</div>												1. Places dedication and commitment to the goals and missions of the Army and nation above personal welfare.	1	X	
												2. Is committed to and shows a sense of pride in the unit - works as a member of the team.	2	X	
												3. Is disciplined and obedient to the spirit and letter of a lawful order.	3	X	
												4. Is honest and truthful in word and deed.	4	X	
												5. Maintains high standards of personal conduct on and off duty.	5	X	
												6. Has the courage of convictions and the ability to overcome fear - stands up for and does what's right.	6	X	
												7. Supports EOE/ED.	7	X	
b. List comments															
o DEDICATED TO THE MISSION AT HAND; WILL NOT QUIT															
o TOTAL TEAM PLAYER; TAKES CARE OF SOLDIERS															
o LEADS BY EXAMPLE; BOTH ON AND OFF DUTY															





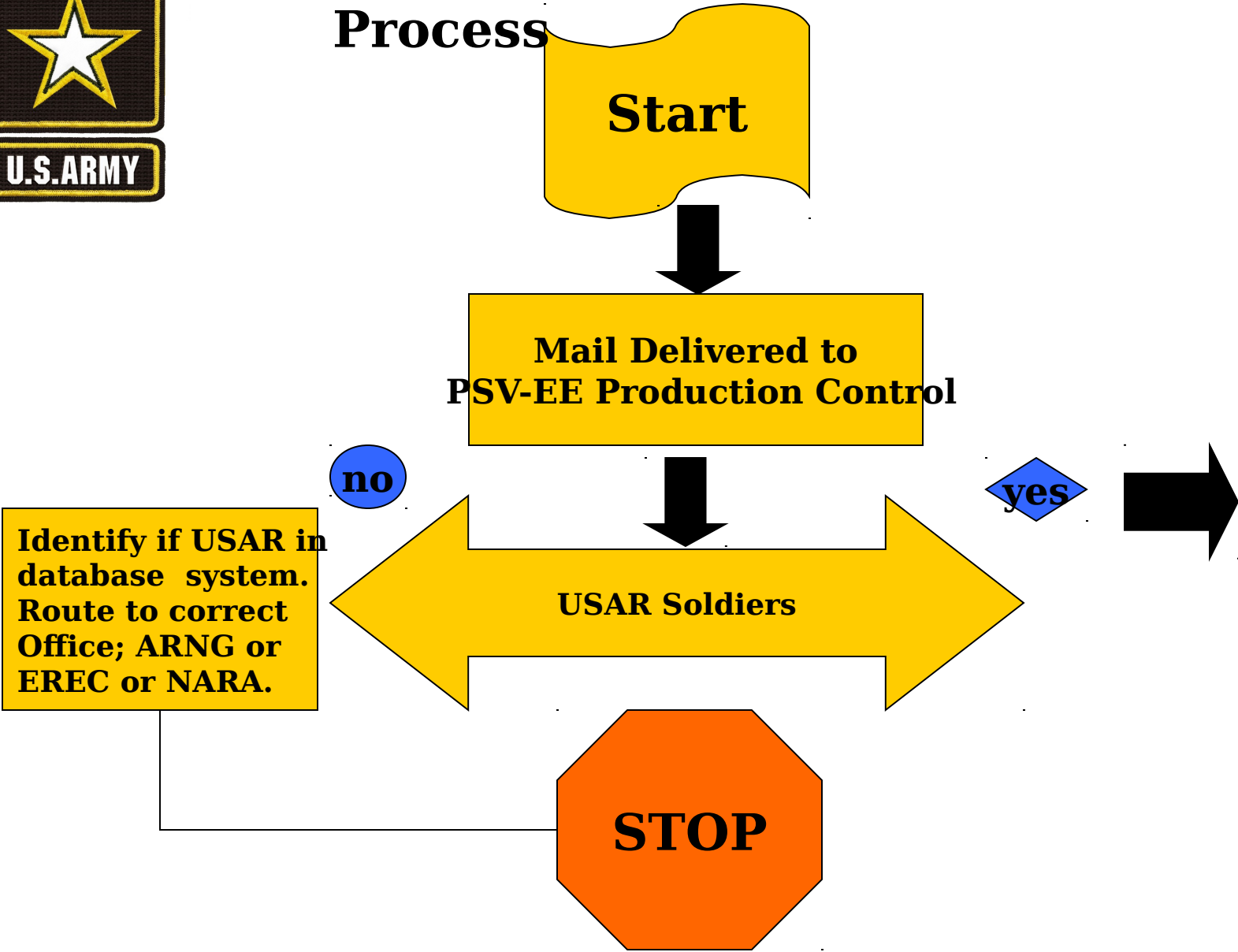
Commander
ARPERSCOM
ATTN: ARPC-PSV-EE
1 Reserve Way
St. Louis, MO 63132

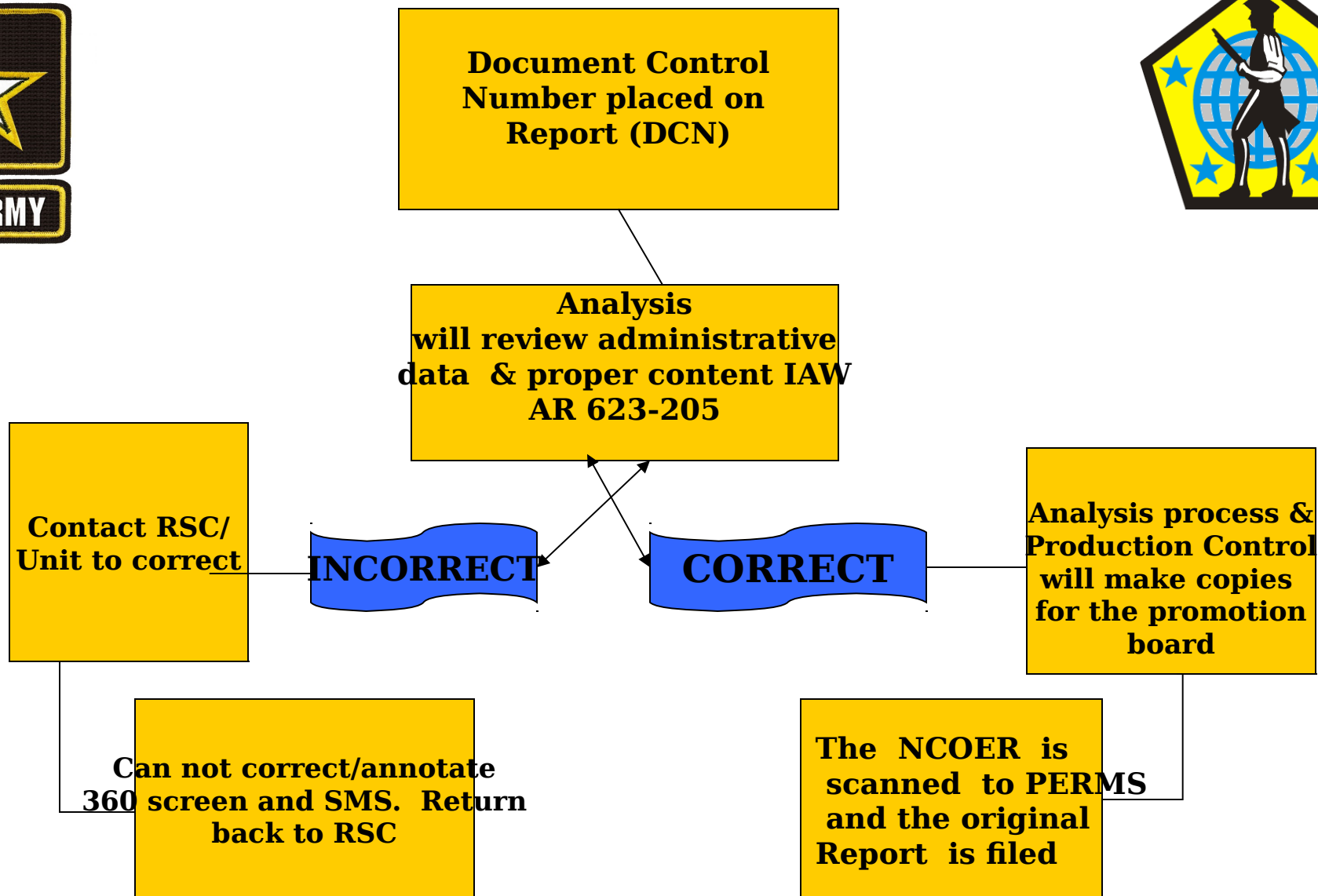
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Enlisted Evaluations Report Process

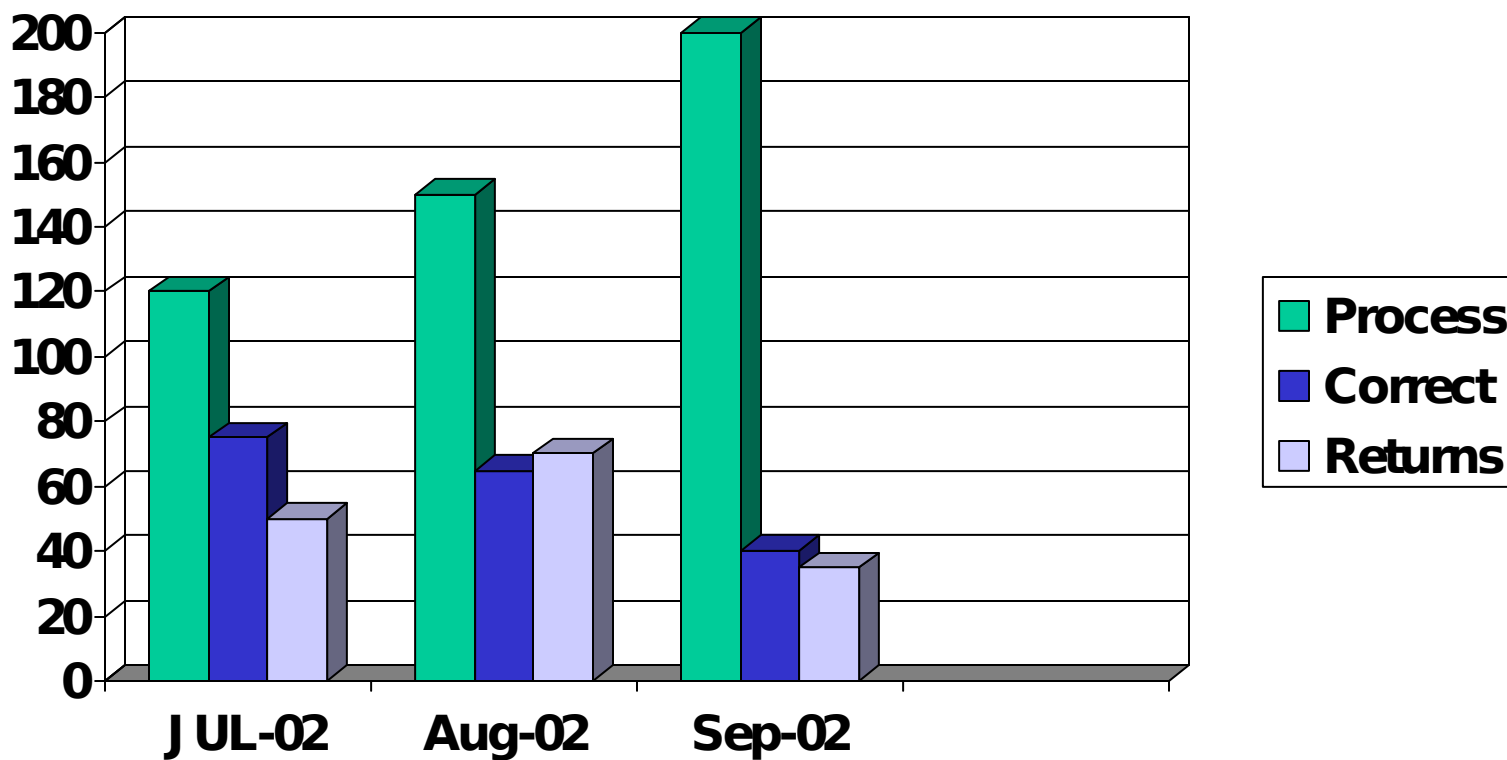






PROBLEMS

- Missing counseling dates (minimum/one)
- UIC and contact number not record
- NCOER's with a Thru date of 1 Nov 01 must be on DA Form 2166-8
- Physical Fitness/ Height and Weight information incorrect or missing





QUESTIONS ?